PENELOPE PREP - TO DO #3

Penelope Learning Academy

The purpose of Penelope online training is to provide a platform where Penelope users can learn about Penelope's functionality and capabilities in an engaging way. The online training takes on a blended learning approach to help maximize the users learning potential and includes features such as content rich videos that can be accessed on any mobile device as well. In addition to this the user can see how many courses they have passed, how many courses they have completed, course progress, and awarded certification.

Finally we can now engage more directly with Penelope and get deeper knowledge of its concepts, processes and capabilities. This is very exciting!

As mentioned previously, this week you will be receiving individualized emails giving you access to the Penelope Learning Academy. Those automated emails will come from the Penelope Learning Academy so please ensure you check this week for any emails in your junk or spam folders, just in case!

There are three main "courses" in interactive video form that will generate a completion certificate at the end of the training. You will have to ensure you save that certificate.

Please keep in mind that what you will see is based on other company's business processes. The CFIR database is being customized to ensure our business processes are met as much as possible. Please try to learn the concepts, the new vocabulary, the new steps but most of all, we hope you will be impressed with everything it will help you and CFIR do more effectively ! Note that some functionalities and procedures you will see can be performed by you and/or just Admin.

When does this need to be done by? We are looking at a **Sunday September 5, 2021**.

Since the go-live will be Saturday October 2nd, September will be the month of intensive virtual training for all therapists, all staff and Leadership team. Due to Covid restrictions, it would be difficult to have a large number people in a class setting while respecting distanciation. For this reason, it was agreed that Penelope in-person training would be replaced with virtual classes. We will provide you with the dates of the classes available in the next few weeks.

COURSES

1 Penelope System Training

This training covers information for Customer Service, Front Desk Staff, Practitioners, and Managers. Course content:

1. Client Information Structure
2. Quick Links, Navigation, Sliding Sidebar, Collaboration suite
3. My Profile
4. Search Function
5. Intake Wizard & Add Individual
6. Service File and Service Wizard
7. Events - Booking, Indirect Events, & Managing
8. Agency Schedule, Rapid Scheduling, & Agency Events
9. Pre-Enrollment List
10. Pages
11. Referrals
12. Blue Book & Collateral Contacts
13. Groups - pt 1
13. Groups - pt 2
14. Informal Series, Informal Events & Informal Service
15. Anonymous Services
16. Attachments
17. Workflow - Tasks, Client Tasks, Reminders
18. Documents
19. Messages Tab

2 ClientConnect

ClientConnect is a client portal giving your clients access to some of their information in Penelope. Your clients can see their profile, their calendar, message history, account balance, etc. Further, ClientConnect enables clients to actively participate in their service provision with the ability to complete new and see previously completed Documents. Clients also have the ability to pay invoices and view a record of past transactions. Course content:

1. Enabling ClientConnect within Penelope
2. ClientConnect Setup
3. ClientConnect - My Services
4. ClientConnect - About Me
5. ClientConnect - Calendar and Inbox
6. ClientConnect - My Account
7. ClientConnect - Things I Need To Do, My Client Connect, Footers
8. ClientConnect - Documents

3 Billing

Billing is accessible to most users and is an important part of the daily processes. Some therapists will choose to bill their clients as part of the appointment process. Payment recording will remain an Admin and Accounting task. Please pay attention to the Funding and Policies as some of you may deal with third party payers; Penelope has great Policies functionalities. Remember we do not bill insurance companies directly.

1. Individual Accounts, Billing Overview, Quick Pay, & Payments
2. Deposits, Debits & Credits
3. Fee For Service, Service Fee Override, Sliding Scale, Admin Setup for Sliding Scale
4. Funder & Funder Account Page, Creating Invoices in Batch Mode
5. Public, Group & Private Policies, & Billing Sequence
6. Returns & Recovery, Coverage Maintenance & Expiry

THANK YOU!

From the CFIR Penelope Transition Team